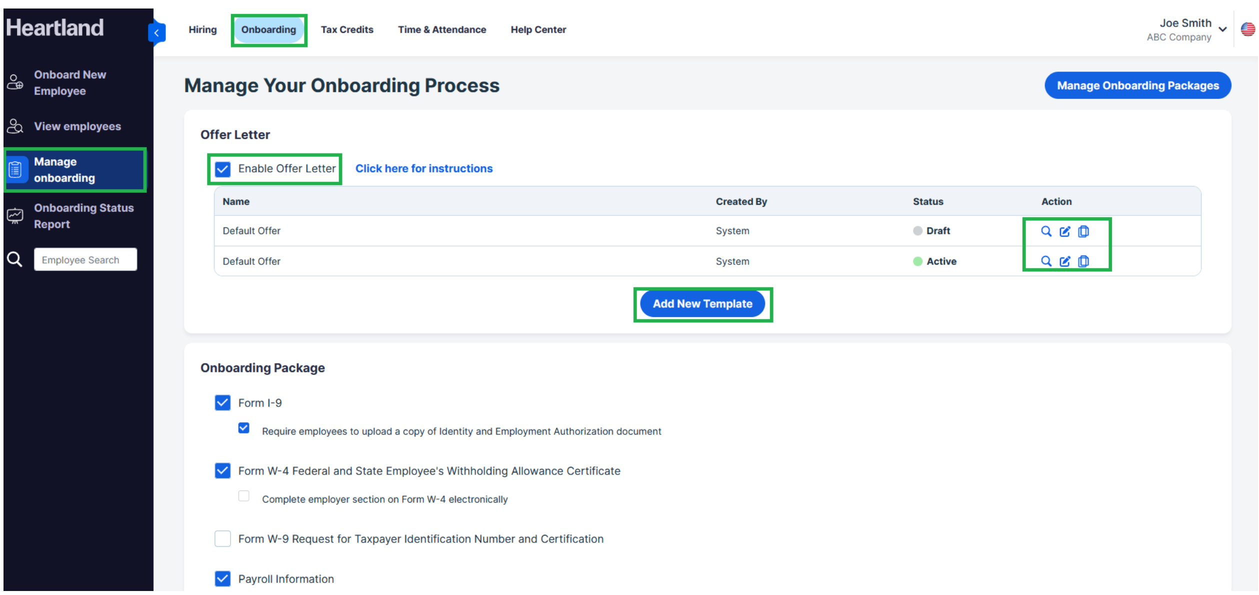
Onboarding Quick Start Guide

Manage Onboarding

Once you have hired a new employee, you will need to send them an onboarding package. Before you can do this, there are a few things you will need to set up first.

Select **Onboarding** from the top menu, and then select **Manage Onboarding** from the left menu. On this page you will be able to create:

- An onboarding letter
- A package of materials to be sent out to the new hire
- Set additional requirements for new hires to complete.



Offer Letter

The first thing you will want to do is to create an offer letter to send to your new hire. You may either edit an existing offer template, or you may create a new one.

In the Offer Letter panel, select **Enable Offer Letter** to enable and reveal the existing offer letters, listing each letter's Status and these Action options:

- (view)
- (edit): Open the edit box for the letter.
- (copy): Copy and save the letter to a new name, and edit it as required.
- (delete)

If you wish to create a new offer letter, select **Add New Template**.

Tip: Select **Click here for instructions** to open the Quick Help page on offer letter management.

Onboarding Package

- In the Onboarding Packages panel, you can update the option selections for the items you want included in your default onboarding package.

Tip: Any updates you make to your default onboarding package are saved automatically.

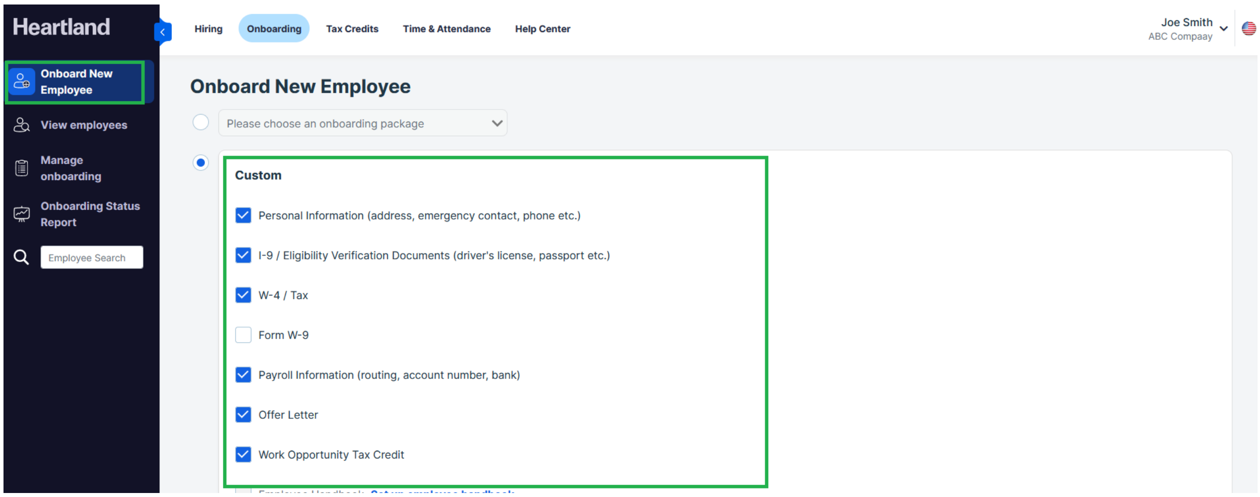
These additional option panels are available:

- **Equal Employee Opportunity (EEO) Informatio**n: Collect EEO and Office of Federal Contract Compliance Programs (OFCCP) information on the employee.
- **Additional Options**: These include requests for the employee to provide driver's license information, direct deposit information and/or a voided check or deposit slip.
- **Additional Documents**: Upload, edit, and select additional documents to include in the boarding package.

Add an Employee

Once you have completed your onboarding package and offer letter setup using the **Manage Onboarding** features, you can add an employee and send them the required package..

1) From the **Onboarding** menu, select Onboarding, and then select **Onboard New Employee**.

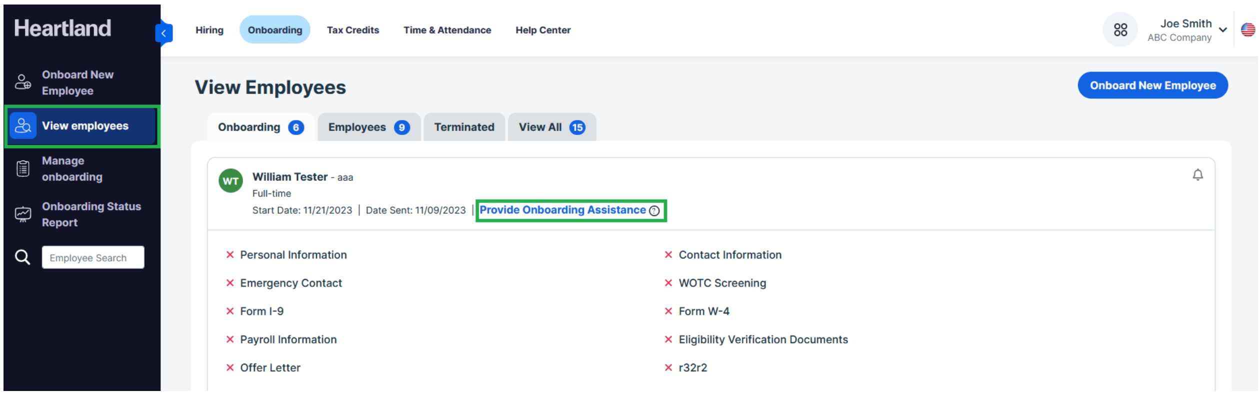


2) You can either select a template, or you may work with the existing one. Complete the details for the new employee on these pages, selecting **Continue** at each page to proceed to the next.
3) Select **Send Onboarding Docs**.
   An **Onboarding Docs Sent Successfully** box opens confirming that the onboarding documents have been emailed to the new employee.
4) Select **View Employees** or **Add New Employee** as required.

Provide Onboarding Assistance

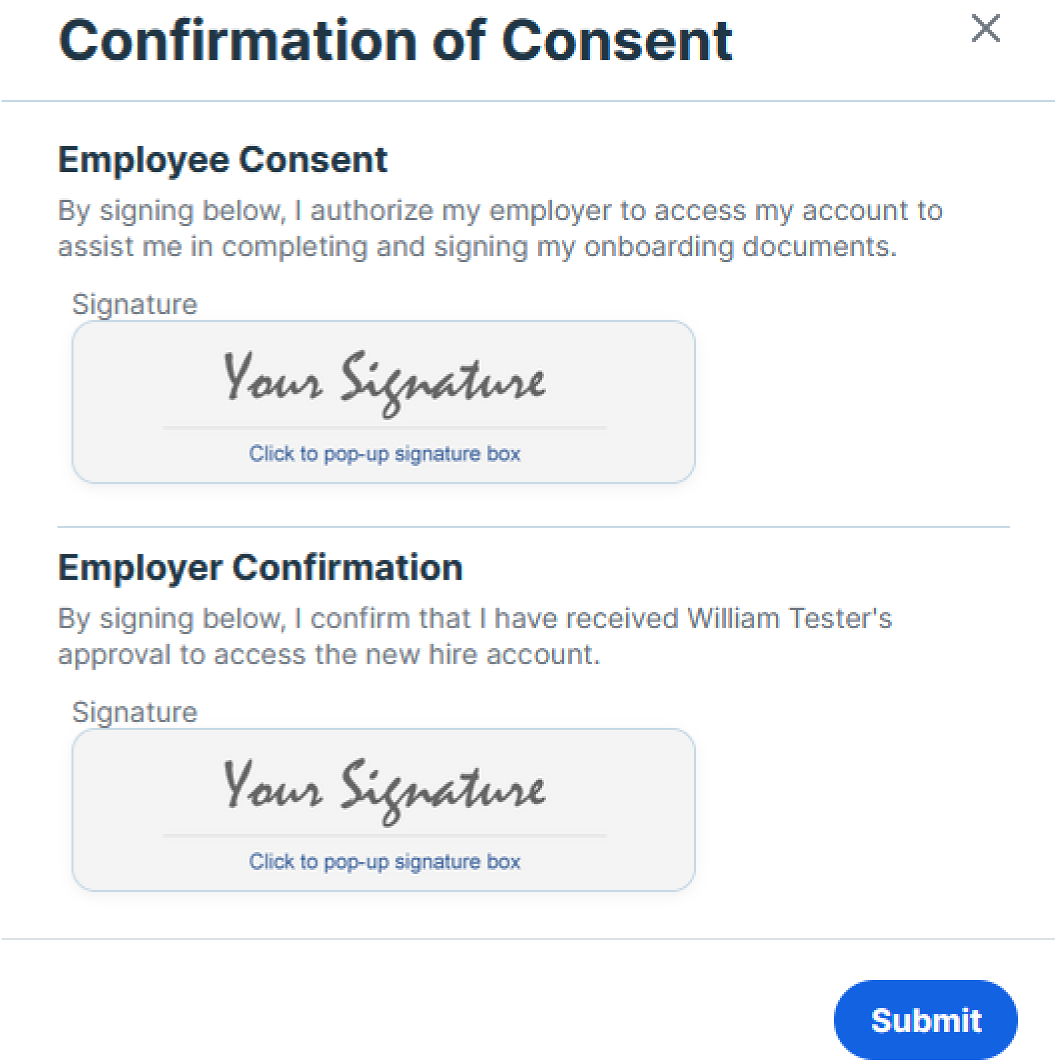
Sometimes, you might need to provide onboarding assistance to a newly-hired employee:

1) From the **Onboarding** menu, and then select **View Employees**.



2) Select the **Onboarding** tab, and then from the employees listed, select **Provide Onboarding Assistance** for the person you want to assist.

   The **Confirmation of Consent** box opens for you and the employee to submit signature consent and confirmation to engage in the onboarding assistance process, after which a page opens enabling you to walk the employee through the onboarding process.



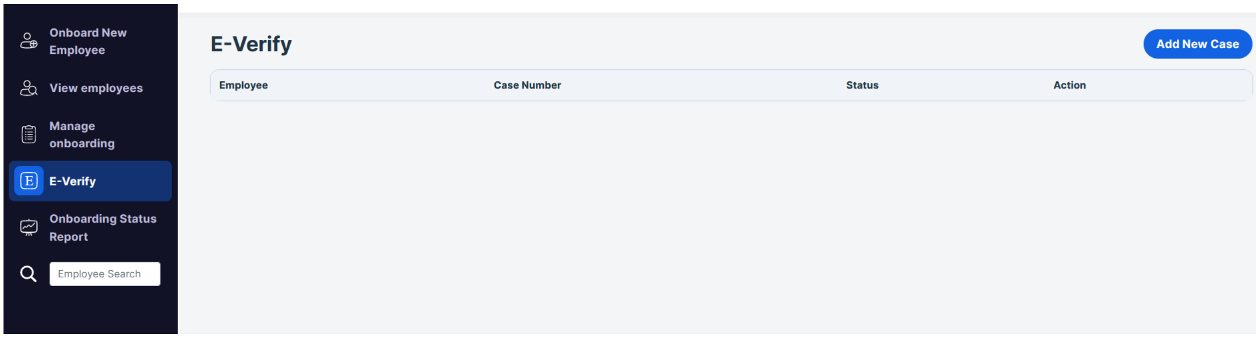
E-Verify

E-Verify is a web-based system that allows enrolled employers to confirm the eligibility of their employees to work in the United States.

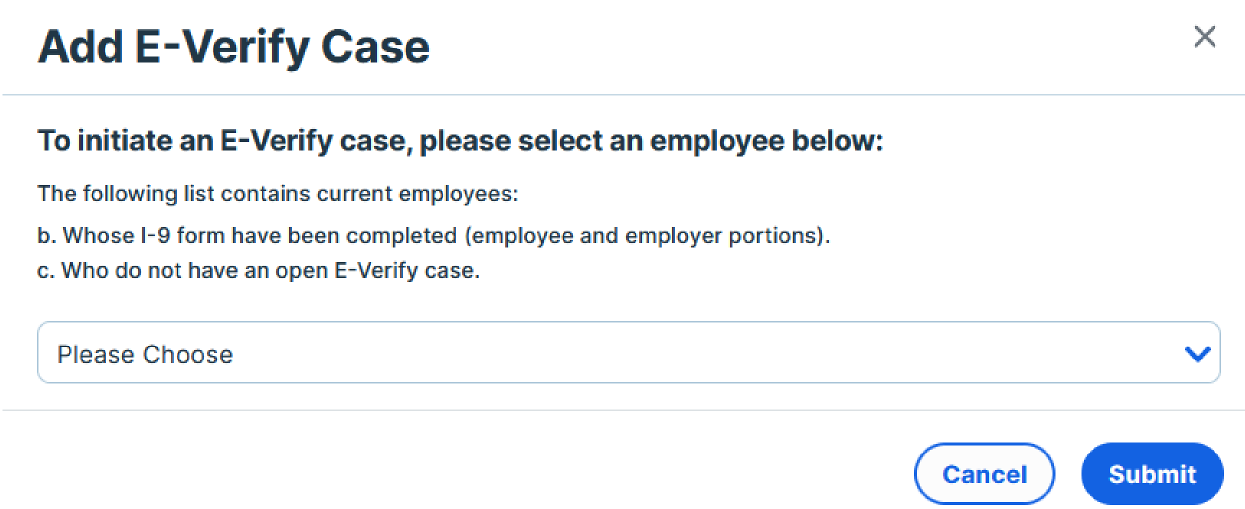
If your system is not set up for E-Verify, you can select the E-Verify option on the Manage Your Onboarding Process page. You will then be sent a Memorandum Of Undersigning (MOU) via email which will need to be signed and submitted.

If your system is set up for E-Verify, you can initiate an E-Verify case for an employee whose I-9 form has been completed.

1) From the Onboarding menu, select **E-Verify**.



Select **Add New Case**.



2) From the drop-down list, select the employee you want to E-Verify, and then select Submit.